

## **EXHIBIT B**

**CUSTOMER CLAIM**

Claim Number \_\_\_\_\_

Date Received \_\_\_\_\_

**BERNARD L. MADOFF INVESTMENT SECURITIES LLC**

In Liquidation

**DECEMBER 11, 2008**

Irving H. Picard, Esq.  
Trustee for Bernard L. Madoff Investment Securities LLC  
Claims Processing Center  
2100 McKinney Ave., Suite 800  
Dallas, TX 75201

Provide your office and home telephone no.

cell:  
OFFICE: 516-521-6877

HOME: 516-484-1377

Taxpayer I.D. Number (Social Security No.)  
\_\_\_\_\_



Account Number: 1ZB499

RONALD GENE WOHL

CREDIT SHELTER TRUST

C/O LINDA WOHL

70 THE INTERVALLE

ROSLYN ESTATES, NY 11576

(If incorrect, please change)

**NOTE: BEFORE COMPLETING THIS CLAIM FORM, BE SURE TO READ CAREFULLY THE ACCOMPANYING INSTRUCTION SHEET. A SEPARATE CLAIM FORM SHOULD BE FILED FOR EACH ACCOUNT AND, TO RECEIVE THE FULL PROTECTION AFFORDED UNDER SIPA, ALL CUSTOMER CLAIMS MUST BE RECEIVED BY THE TRUSTEE ON OR BEFORE March 4, 2009. CLAIMS RECEIVED AFTER THAT DATE, BUT ON OR BEFORE July 2, 2009, WILL BE SUBJECT TO DELAYED PROCESSING AND TO BEING SATISFIED ON TERMS LESS FAVORABLE TO THE CLAIMANT. PLEASE SEND YOUR CLAIM FORM BY CERTIFIED MAIL - RETURN RECEIPT REQUESTED.**

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1. Claim for money balances as of **December 11, 2008**:

a. The Broker owes me a Credit (Cr.) Balance of \$ 0

b. I owe the Broker a Debit (Dr.) Balance of \$ 0

- c. If you wish to repay the Debit Balance,  
please insert the amount you wish to repay and  
attach a check payable to "Irving H. Picard, Esq.,  
Trustee for Bernard L. Madoff Investment Securities LLC."

If you wish to make a payment, it must be enclosed  
with this claim form.

\$                       
"NONE"

- d. If balance is zero, insert "None."

2. Claim for securities as of December 11, 2008:

SEE ATTACHED NOVEMBER 30, 2008 STATEMENT

**PLEASE DO NOT CLAIM ANY SECURITIES YOU HAVE IN YOUR POSSESSION.**

- |   | <u>YES</u> | <u>NO</u> |
|---|------------|-----------|
| a. The Broker owes me securities        | <u>✓</u>   |           |
| b. I owe the Broker securities          |            | <u>✓</u>  |
| c. If yes to either, please list below: |            |           |

Date of Transaction (trade date)	Name of Security	Number of Shares or Face Amount of Bonds	
		The Broker Owes Me (Long)	I Owe the Broker (Short)
<u>                    </u>	<u>                    </u>	<u>                    </u>	<u>                    </u>
<u>                    </u>	<u>SEE ATTACHED</u>	<u>                    </u>	<u>                    </u>
<u>                    </u>	<u>NOVEMBER 30, 2008</u>	<u>                    </u>	<u>                    </u>
<u>                    </u>	<u>STATEMENT</u>	<u>                    </u>	<u>                    </u>
<u>                    </u>	<u>                    </u>	<u>                    </u>	<u>                    </u>

Proper documentation can speed the review, allowance and satisfaction of your claim and shorten the time required to deliver your securities and cash to you. Please enclose, if possible, copies of your last account statement and purchase or sale confirmations and checks which relate to the securities or cash you claim, and any other documentation, such as correspondence, which you believe will be of assistance in processing your claim. In particular, you should provide all documentation (such as cancelled checks, receipts from the Debtor, proof of wire transfers, etc.) of your deposits of cash or securities with the Debtor from as far back as you have documentation. You should also provide all documentation or

**information regarding any withdrawals you have ever made or payments received from the Debtor.**

Please explain any differences between the securities or cash claimed and the cash balance and securities positions on your last account statement. If, at any time, you complained in writing about the handling of your account to any person or entity or regulatory authority, and the complaint relates to the cash and/or securities that you are now seeking, please be sure to provide with your claim copies of the complaint and all related correspondence, as well as copies of any replies that you received.

**PLEASE CHECK THE APPROPRIATE ANSWER FOR ITEMS 3 THROUGH 9.**

**NOTE: IF "YES" IS MARKED ON ANY ITEM, PROVIDE A DETAILED EXPLANATION ON A SIGNED ATTACHMENT. IF SUFFICIENT DETAILS ARE NOT PROVIDED, THIS CLAIM FORM WILL BE RETURNED FOR YOUR COMPLETION.**

- |   | <u>YES</u>      | <u>NO</u>             |
|---|-----------------|-----------------------|
| 3. Has there been any change in your account since December 11, 2008? If so, please explain.  | _____           | <u>No</u>             |
| 4. Are you or were you a director, officer, partner, shareholder, lender to or capital contributor of the broker?   | _____           | <u>No</u>             |
| 5. Are or were you a person who, directly or indirectly and through agreement or otherwise, exercised or had the power to exercise a controlling influence over the management or policies of the broker? | _____           | <u>No</u>             |
| 6. Are you related to, or do you have any business venture with, any of the persons specified in "4" above, or any employee or other person associated in any way with the broker? If so, give name(s)    | _____           | <u>No</u>             |
| 7. Is this claim being filed by or on behalf of a broker or dealer or a bank? If so, provide documentation with respect to each public customer on whose behalf you are claiming.                         | _____           | <u>No</u>             |
| 8. Have you ever given any discretionary authority to any person to execute securities transactions with or through the broker on your behalf? Give names, addresses and phone numbers.                   | <u>not sure</u> | <u><del>Yes</del></u> |

9. Have you or any member of your family  
ever filed a claim under the Securities  
Investor Protection Act of 1970? if  
so, give name of that broker.

No

Please list the full name and address of anyone assisting you in the  
preparation of this claim form: \_\_\_\_\_

If you cannot compute the amount of your claim, you may file an estimated claim. In that  
case, please indicate your claim is an estimated claim.

**IT IS A VIOLATION OF FEDERAL LAW TO FILE A FRAUDULENT CLAIM.  
CONVICTION CAN RESULT IN A FINE OF NOT MORE THAN \$50,000 OR  
IMPRISONMENT FOR NOT MORE THAN FIVE YEARS OR BOTH.**

**THE FOREGOING CLAIM IS TRUE AND ACCURATE TO THE BEST OF MY  
INFORMATION AND BELIEF.**

Date _____	Signature _____ <i>Jack Most, Esq.</i> <u>co-trustee</u>
Date _____	Signature _____ <i>Linda Leavelle</i> <u>co-trustee</u>
Date _____	Signature _____ <i>Linda Worn</i> <u>- co trustee</u>
	<i>Allison George</i>

(If ownership of the account is shared, all must sign above. Give each owner's name,  
address, phone number, and extent of ownership on a signed separate sheet. If other  
than a personal account, e.g., corporate, trustee, custodian, etc., also state your capacity  
and authority. Please supply the trust agreement or other proof of authority.)

**This customer claim form must be completed and mailed promptly,  
together with supporting documentation, etc. to:**

Irving H. Picard, Esq.,  
Trustee for Bernard L. Madoff Investment Securities LLC  
Claims Processing Center  
2100 McKinney Ave., Suite 800  
Dallas, TX 75201



**BERNARD L. MADOFF**  
INVESTMENT SECURITIES LLC  
New York □ London

885 Third Avenue  
New York, NY 10022  
(212) 230-2434  
800 334-1343  
Fax (212) 838-4061

Associated with  
Madoff Securities International Limited  
12 Berkeley Street  
Mayfair, London W1J 8DT  
Tel 020 7493 6322

**\*\*DUPLICATE\*\* FOR ACCOUNT RONALD GENE WOHL**  
LOIS REISMAN, CPA  
TRUST ACCOUNTANT

28 CAMPBELL DRIVE  
DIX HILLS NY 11746

PERIOD ENDING  
11/30/08

PAGE  
1

YOUR ACCOUNT NUMBER  
1-ZB499-3-0

YOUR TAX PAYER IDENTIFICATION NUMBER  
\*\*\*\*\*5800

DATE	BOUGHT RECEIVED	SOLD DELIVERED	TRN	DESCRIPTION	PRICE OR SYMBOL	AMOUNT DEBITED TO YOUR ACCOUNT	AMOUNT CREDITED TO YOUR ACCOUNT
				BALANCE FORWARD		58,958.66	
11/12	882		1569	WELLS FARGO & CO NEW	29.800	26,318.60	
11/12	630		2071	HEWLETT PACKARD CO	34.900	22,012.00	
11/12	546		5895	WAL-MART STORES INC	55.830	30,504.18	
11/12	357		6397	INTERNATIONAL BUSINESS MACHS	87.270	31,169.39	
11/12	1,323		10221	EXXON MOBIL CORP	72.880	96,472.24	
11/12	1,449		10723	INTEL CORP	14.510	21,081.99	
11/12	693		15049	JOHNSON & JOHNSON	59.580	41,315.94	
11/12	945		19374	J.P. MORGAN CHASE & CO	38.530	36,447.85	
11/12	504		23700	COCA COLA CO	44.660	22,528.64	
11/12	294		28026	MCDONALDS CORP	55.370	16,289.78	
11/12	546		32352	MERCK & CO	28.550	15,609.30	
11/12	1,995		36678	MICROSOFT CORP	21.810	43,589.95	
11/12	1,008		41004	ORACLE CORPORATION	17.300	17,478.40	
11/12	399		53982	PEPSICO INC	56.410	22,522.59	
11/12	231		54484	APPLE INC	100.780	23,289.18	
11/12	1,701		58308	PFIZER INC	16.940	28,882.94	
11/12	399		58810	ABBOTT LABORATORIES	54.610	21,804.39	
11/12	756		62634	PROCTER & GAMBLE CO	64.080	48,474.48	
11/12	273		63136	AMGEN INC	59.160	16,160.68	
11/12	525		66960	PHILLIP MORRIS INTERNATIONAL	43.600	22,911.00	
11/12	1,260		67462	BANK OF AMERICA	21.590	27,253.40	
11/12	420		71286	QUALCOMM INC	33.770	14,199.40	
11/12	1,365		71788	CITI GROUP INC	12.510	17,130.15	
				CONTINUED ON PAGE 2			



**BERNARD L. MADOFF**  
INVESTMENT SECURITIES LLC  
New York ☐ London

885 Third Avenue  
New York, NY 10022  
(212) 230-2424  
800 334-1343  
Fax (212) 838-4061

Associated with  
Madoff Securities International Limited  
12 Berkeley Street  
Mayfair, London W1J 8DT  
Tel 020 7498 6222

**\*\*DUPLICATE\*\* FOR ACCOUNT RONALD GENE WOHL**  
LOIS REISMAN, CPA  
TRUST ACCOUNTANT

28 CAMPBELL DRIVE  
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PRINTED NUMBER  
11/30/08

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2

YOUR ACCOUNT NUMBER  
1-28499-3-0

YOUR TAX PAYER IDENTIFICATION NUMBER  
\*\*\*\*\*5800

DATE	BOUGHT RECEIVED	SOLD DELIVERED	TIN	DESCRIPTION	PRICE OR SYMBOL	AMOUNT DEBITED TO YOUR ACCOUNT	AMOUNT CREDITED TO YOUR ACCOUNT
11/12	315		75612	SCHLUMBERGER LTD	49.480	15,598.20	
11/12	756		76114	COMCAST CORP	16.510	12,511.56	
				CL A			
11/12	1,491		79938	AT&T INC	27	40,316.00	
11/12	378		80440	CONOCOPHILIPS	52.510	19,863.78	
11/12	252		84264	UNITED PARCEL SVC INC	52.040	13,124.08	
				CLASS B			
11/12	1,533		84766	CISCO SYSTEMS INC	16.730	25,708.09	
11/12	441		88590	U S BANCORP	29.530	13,039.73	
11/12	525		89092	CHEVRON CORP	73.430	38,571.75	
11/12	252		92916	UNITED TECHNOLOGIES CORP	53.160	13,406.32	
11/12	2,667		93418	GENERAL ELECTRIC CO	19.630	52,459.21	
11/12	714		97242	VERIZON COMMUNICATIONS	30.410	21,740.74	
11/12	63		97744	GOOGLE	337.400	21,258.20	
11/12		925,000	24175	U S TREASURY BILL DUE 2/12/2009	99.936		924,408.00
				2/12/2009			
11/12				FIDELITY SPARTAN	DIV		25.38
				U S TREASURY MONEY MARKET			
				DIV 11/12/08			
11/12		38,839	19279	FIDELITY SPARTAN	1		38,839.00
				U S TREASURY MONEY MARKET			
11/12	7,986		28647	FIDELITY SPARTAN	1	7,986.00	
				U S TREASURY MONEY MARKET			
11/19				FIDELITY SPARTAN	DIV		.98
				U S TREASURY MONEY MARKET			
				DIV 11/19/08			
				CONTINUED ON PAGE 3			



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11/19		7,986	54188	FIDELITY SPARTAN	1		7,986.00
11/19	50,000		58610	U S TREASURY MONEY MARKET			
				U S TREASURY BILL	99.926	49,963.00	
				DUE 03/26/2009			
				3/26/2009			
11/19	20,940		63224	FIDELITY SPARTAN	1	20,940.00	
				U S TREASURY MONEY MARKET			
				NEW BALANCE		117,632.43	
	1,491			SECURITY POSITIONS	MKT PRICE		
	399			AT&T INC	28.560		
	273			ABBOTT LABORATORIES	52.390		
	231			AMGEN INC	55.540		
	1,260			APPLE INC	92.670		
	525			BANK OF AMERICA	16.250		
	1,533			CHEVRON CORP	79.010		
	1,365			CISCO SYSTEMS INC	16.540		
	504			CITI GROUP INC	8.290		
	756			COCA COLA CO	46.870		
				COMCAST CORP	17.340		
				CL A			
	378			CONOCOPHILIPS	52.520		
	1,323			EXXON MOBIL CORP	80.150		
	2,667			GENERAL ELECTRIC CO	17.170		
				CONTINUED ON PAGE 4			





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4

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	63			GOOGLE	292.960		
	630			HEWLETT PACKARD CO	35.280		
	1,449			INTEL CORP	13.800		
	357			INTERNATIONAL BUSINESS MACHS	81.600		
	945			J.P. MORGAN CHASE & CO	31.660		
	693			JOHNSON & JOHNSON	58.580		
	294			MCDONALDS CORP	58.750		
	546			MERCK & CO	26.720		
	1,995			MICROSOFT CORP	20.220		
	1,008			ORACLE CORPORATION	16.090		
	399			PEPSICO INC	56.700		
	1,701			PFIZER INC	16.430		
	525			PHILLIP MORRIS INTERNATIONAL	42.160		
	756			PROCTER & GAMBLE CO	64.350		
	420			QUALCOMM INC	33.570		
	315			SCHLUMBERGER LTD	50.740		
	20,940			FIDELITY SPARTAN	1		
				U S TREASURY MONEY MARKET			
	441			U S BANCORP	26.980		
	252			UNITED PARCEL SVC INC	57.600		
				CLASS B			
	50,000			U S TREASURY BILL	99.971		
				DUE 03/26/2009			
				3/26/2009			
	252			UNITED TECHNOLOGIES CORP	48.530		
				CONTINUED ON PAGE 5			

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DATE	BOUGHT RECEIVED	SOLD DELIVERED	TRN	DESCRIPTION	PRICE OR SYMBOL	AMOUNT DEBITED TO YOUR ACCOUNT	AMOUNT CREDITED TO YOUR ACCOUNT
	714			VERIZON COMMUNICATIONS	32.650		
	546			WAL-MART STORES INC	55.880		
	882			WELLS FARGO & CO NEW	28.890		
				MARKET VALUE OF SECURITIES			
				LONG			
				SHORT			
				996,149.59			



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DATE	BOUGHT RECEIVED	SOLD DELIVERED	TRN	DESCRIPTION	PRICE OR SYMBOL	AMOUNT DEBITED TO YOUR ACCOUNT	AMOUNT CREDITED TO YOUR ACCOUNT
				YEAR-TO-DATE SUMMARY			
				DIVIDENDS			6,935.25
				GROSS PROCEEDS FROM SALES			7,598,046.15



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1-ZB499-4-0

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				BALANCE FORWARD			58,959.00
11/12		21	45330	S & P 100 INDEX NOVEMBER 460 CALL	15.800		33,159.00
11/12	21		49656	S & P 100 INDEX NOVEMBER 450 PUT	17.800	37,401.00	
11/19		21	35760	S & P 100 INDEX DECEMBER 430 CALL	26		54,579.00
11/19	21		40085	S & P 100 INDEX DECEMBER 420 PUT	30	63,021.00	
11/19	21		44410	S & P 100 INDEX NOVEMBER 460 CALL	3	6,321.00	
11/19		21	48735	S & P 100 INDEX NOVEMBER 450 PUT	37		77,679.00
				NEW BALANCE			117,633.00
		21		SECURITY POSITIONS S & P 100 INDEX	MKT PRICE 23.300		
	21			DECEMBER 430 CALL S & P 100 INDEX	16.500		
				DECEMBER 420 PUT			
				MARKET VALUE OF SECURITIES			
				LONG			
				SHORT			
				34,650.00			48,930.00-